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THE UNIVERSITY OF BRITISH COLUMBIA

UBC Faculty of Medicine

Resident Management System (RMS)

User Guide

(for Program Administrators and Directors)

VERSION P1.0 (OCT 2014)

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1 RMS Basics

1.1 Log In

- ▶▶ In order to log into Resident Management System (RMS), a user account must be assigned to you by the RMS Business Support Analyst. If you do not have a user account, please contact rms.support@ubc.ca.
- ▶▶ A Campus Wide Login (CWL) is required to access the system at the following training site URL: www.train.rms.med.ubc.ca
- ▶▶ Here is a link to the UBC CWL page for your reference: <http://it.ubc.ca/services/accounts-passwords/campus-wide-login-cwl>.

- ▶▶ Enter your CWL Login name.
- ▶▶ Enter your password.

PLEASE NOTE: Usernames and Passwords ARE case-sensitive.

- ▶▶ Press **[Enter]** or click the **Continue >** button.
- ▶▶ The RMS Home Screen will be displayed upon login.

Unsuccessful logins (due to mistyped login name and/or passwords) will generate an error message and give the user an opportunity to attempt another login. There are a maximum number of 3 attempts at which time the user will be redirected to CWL site for password recovery.

The live site will not be available to users until October 27, 2014. You will be notified by the RMS Business Support Analyst when this site is available.

1.2 Log Out

▶▶ To log out of RMS, click the **Sign Out** link that appears in the upper left corner of the screen.

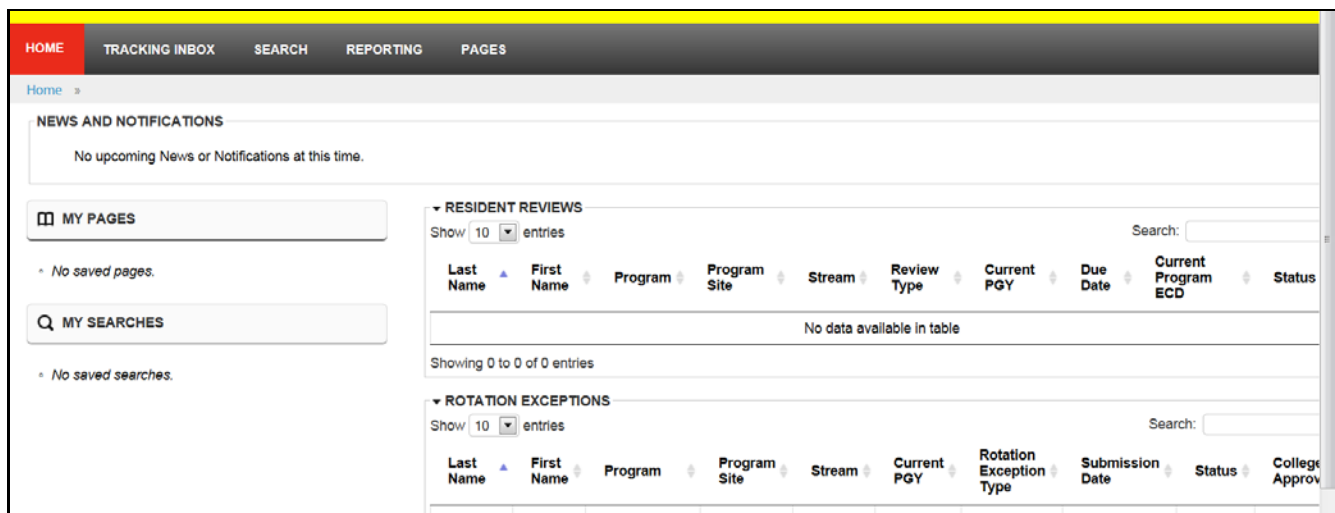


RMS initiates an inactivity clock when a user logs into the system. If 30 minutes of inactivity occur, the user is automatically logged out of the system. Periods of inactivity include those times between saving data, clicking a navigation tab, or refreshing the screen by clicking on the refresh icon on the screen.

PLEASE NOTE: You must sign-out at the end of each session. If the browser is closed without clicking Sign Out, the session will not end until the account is timed-out due to inactivity.

1.3 Home Page

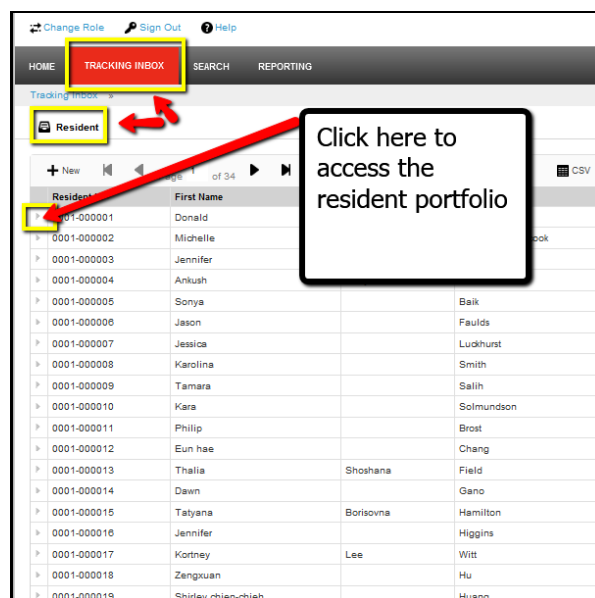
The **Home Page** (located in the **Home** tab) is the first screen displayed after logging in. It contains queues (News & Notifications, Promotions, Rotation Exceptions, and Statutory Holidays) that you will be using on a daily basis.



1.4 Resident Tracking Inbox

The **Resident Tracking Inbox** (located in the **Tracking Inbox** tab) contains a list of residents within your program (or list of residents you have access to).

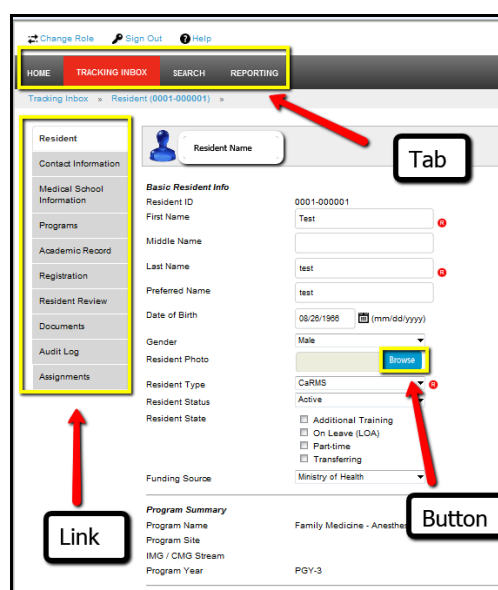
▶▶ **Resident Portfolios** are accessed through the **Tracking Inbox** tab.



1.5 Navigating

▶▶ Users can navigate through RMS by using:

- ◆ tabs across the top of the page
- ◆ buttons and links within each tab



- ▶▶ Once you access a tab, a “breadcrumb trail” will appear allowing you to go back to the previous screen(s).

Definition: Breadcrumb Trail - a series of links separated by right pointing arrows, which display a visual record of exactly where the user is within the system.

- ▶▶ To navigate using the **breadcrumb trail**, click on the section of the path to be viewed.

Example: In the screen shot below, the user is at the **Rotation Exception** page in the **Tracking Inbox**. In order to go back to any of the previous pages, the user can click on the link containing the name of the page that needs to be viewed (e.g. Academic Record).



- ▶▶ Users should navigate RMS by using the tabs, buttons and links provided by the system rather than the browser’s back button to ensure real-time information is accessed.

PLEASE NOTE: If a user accidentally clicks the browser’s back button they will receive an error message. Click the Refresh button next to the address bar or press the F5 button on your keyboard to return to RMS.

1.6 Resident Portfolio

- ▶▶ To access the **Resident Portfolio**, click **Resident Tracking Inbox** and select your Resident OR use [Standard Search](#) to find a specific Resident.
- ▶▶ The resident portfolio contains the following Resident information:
 - ◆ Resident Profile Page
 - ◆ Contact Information
 - ◆ Medical & School Information
 - ◆ Programs
 - ◆ Academic Record
 - ◆ Registration
 - ◆ Stat Holiday Worked
 - ◆ Resident Review
 - ◆ Documents
 - ◆ Audit Log
 - ◆ Assignments

The screenshot displays the 'Resident Portfolio' form within the OBRMS system. The form is organized into a sidebar menu on the left and a main content area. The sidebar menu includes options like 'Resident', 'Contact Information', 'Medical School Information', 'Programs', 'Academic Record', 'Registration', 'Stat Holiday Worked', 'Resident Review', 'Documents', 'Audit Log', and 'Assignments'. The main content area is titled 'Resident Portfolio' and contains a 'Basic Resident Info' section. This section includes fields for 'Resident ID' (0001-000009), 'First Name' (John), 'Middle Name', 'Last Name' (Doe), 'Preferred Name', 'Date of Birth' (June 1980), 'Gender' (Female), 'Resident Photo' (with a 'Browse' button), 'Resident Type' (CaRMS), 'Resident Status' (Active), 'Resident State', and 'Funding Source' (Ministry of Health). Red arrows highlight the navigation from the 'Resident' menu item to the 'Resident Portfolio' title and from the 'Resident Photo' field to the 'Resident Portfolio Information' box.

1.7 UBC Postgraduate Medical Education Policies

- ▶ Please ensure your familiarity with the **Postgraduate Medical Education (PGME) Policies** prior to performing any **Actions** on RMS.
- ▶ Here is a link to the PGME Policies website for your reference:
<http://postgrad.med.ubc.ca/program-information/policies-2/>

2 Rotation Exceptions

DEFINITION: Rotation Exception - A deviation in the planned course of a learner's participation in the rotations required to complete a program. Examples of rotation exceptions include the interruption of training due to a leave of absence, transfer, etc.

2.1 Requesting Rotation Exceptions – Basic Steps

- ▶ Click [Resident Tracking Inbox](#) and find the Resident for whom you want to add an exception.
- ▶ Click the arrow to the left of the Resident name to access the [Resident Portfolio](#) OR use [Standard Search](#) to find a specific Resident.
- ▶ There are two ways to create a Rotation Exception for a Resident:

1. Using the “Rotation Exception Information” (for current PGY only) :

- a) Scroll through the **Resident Profile** to find the **Rotation Exception Information**.
- b) Click **Create Rotation Exception**.

- c) Hover over the **Rotation Exception** link in the left navigation box and choose **New Rotation Exception**.
- d) Choose your rotation exception type using the drop-down list.
- e) Each rotation exception type will require different submission information and this information will populate when the appropriate rotation exception is chosen.

2. Accessing “Rotation Exception” through the Academic Record (for future or retroactive PGY level requests):

- a) Choose **Academic Record** in the navigation panel in the **Resident Portfolio**.
- b) Choose the specific program year record in which you want to add a rotation exception.

Program	Program Year
Anesthesiology	PGY-4
Anesthesiology	PGY-3
Anesthesiology	PGY-5
Family Medicine	PGY-3
Family Medicine - Anesthesiology	PGY-3

- c) Follow steps C-D above.


2.2 Rotation Exception: Leave Requests

DEFINITION: A Resident who is taking time off for various reasons including: Medical Leave, Personal Leave, Maternity Leave, Parental Leave, Compassionate Leave, Adoption Leave.





2.2.1 Submitting a Leave Request

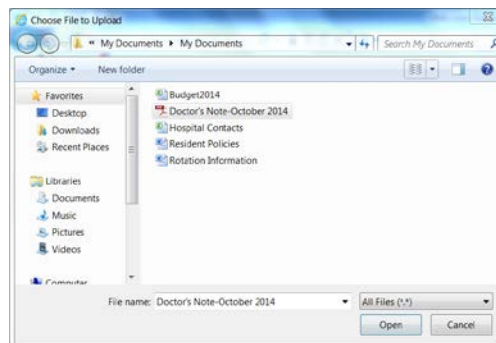
PLEASE NOTE: This request is currently initiated by the Program Administrator. Residents will be able to request their own Leave Rotation Exception using RMS in early-2015. The RMS Business Support Analyst will provide more information at a later date.

- ▶▶ Refer to the steps in [2.1](#) to start a **Leave Rotation Exception**.
- ▶▶ Select Leave in the Rotation Exception Type field.
- ▶▶ Enter or select the applicable information required. A Leave Type, Start Date and End Date must be entered.

- ◆ To enter a date click on the calendar icon  to open a separate calendar window allowing you to select the appropriate date. Or you can type the date in the mm/dd/yyyy format.



- ◆ Select the date on the calendar by clicking on the appropriate date. Clicking the  or  will move the month in the desired direction. Clicking the  or  will move the year in the desired direction.
- ▶▶ To upload a file, click the **Browse** button. This will open a dialog box allowing a file to be uploaded. Select the appropriate file and click **Open**.



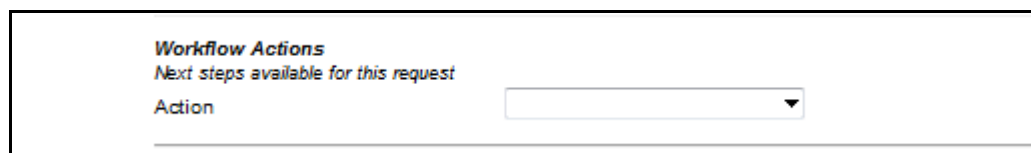
- ▶▶ Once all required information has been entered click **SAVE**.
- ▶▶ The leave request will now have a status of OPEN (Leave). This allows the Program Administrator to review or possibly cancel the leave request prior to approving or submitting to Program Director for approval.

PLEASE NOTE: Workflow Overview – Always check this area to ensure the status of your request has been updated as well as to read important messages (e.g. missing required information.)

2.2.2 Approving a Leave Request

As Program Administrator you have just created your Leave Rotation Exception. It is in the OPEN (Leave) status and requires approval:

- ▶ Under the **Rotation Exceptions** queue within your **Home Page**, select the Resident with a Leave that is OPEN and ready for approval.
- ▶ Scroll to find **Workflow Actions**.



The screenshot shows a box titled "Workflow Actions" with the subtitle "Next steps available for this request". Below this is a label "Action" followed by a dropdown menu with a downward arrow.

- ▶ Choose the appropriate **Action** from the drop-down list:
 - ◆ **Approve** (Leave will be submitted and approved).
 - ◆ **Submit to Program Director for Approval** (Your Program Director will receive a notification that they have a task in the RMS System that requires their attention).
 - ◆ **Cancel** (The Leave request cannot be completed until the Program Director takes action in the system).
- ▶ Click **SAVE**.

If you choose to **Submit to Program Director for Approval**, the Program Director will receive an OPEN (Leave) Exception notification.

Once the Program Director has received notification to review, he/she will be required to:

- ▶ Scroll to find **Workflow Action**
- ▶ Choose the appropriate **Action**:
 - ◆ **Approve** (Leave will be submitted and approved).
 - ◆ **Decline** (Leave will not be submitted).
 - ◆ **Additional Information Required** (Internal comments can be entered in the **Internal Comments** box for Program Administrator to review).
- ▶ Click **SAVE**.

PLEASE NOTE: "Comments" are visible to ALL users including Residents. "Internal Comments" are only visible to Administrators.

If the leave request is approved then the following updates will be made to the Resident's profile:

- ◆ The Resident's academic record is updated to reflect the time away.
- ◆ The program ECD is updated to reflect the final PGY end date.

PLEASE NOTE: Please confirm that the updated academic record and program ECD are correct.

2.3 Rotation Exception: Part-Time Requests

PLEASE NOTE: All Part-Time Training Requests must comply with the RCPSC and CFPC Policies on Part-Time Training. These policies can be found in the RCPSC document [“Policies and Procedures for Certification and Fellowship”](#) and on the CFPC Website under [“Requirements for Residency Eligibility”](#)

2.3.1 Requesting a Part-Time Rotation Exception

PLEASE NOTE: This request is currently initiated by the Program Administrator. Residents will be able to request their own Part-Time Rotation Exceptions using RMS in early-2015. The RMS Business Support Analyst will provide more information at a later date.

- ▶▶ Refer to the steps in [2.1](#) to start a **Part-Time Rotation Exception**.
- ▶▶ Choose Part-Time under Rotation Exception Type.
- ▶▶ Enter **Start** and **End Date** of Part-Time request.
- ▶▶ Add in the **FTE %** (Full time equivalent) of the part-time.
- ▶▶ Click **SAVE**.
- ▶▶ Your request status has now changed to OPEN (Part-Time).
- ▶▶ Under **Workflow Actions**, you must submit to Program Director or Dean’s Office for approval. You can also **CANCEL** the request if necessary.

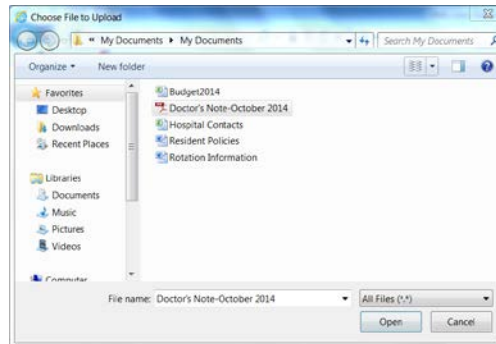
2.3.2 Submitting a Part-Time Request

As Program Administrator you have just created your **Part-Time** rotation exception. It is in the OPEN (Part-Time) status and further action is required:

- ▶▶ Scroll to find **Workflow Actions**.
- ▶▶ Choose the appropriate **Action**:
 - ◆ **Submit to Program Director** (Your Program Director will receive a notification that they have a task in the RMS System that requires their attention).
 - ◆ **Submit to Dean’s Office** (The Dean’s Office will receive a notification that they have a task in RMS that requires their attention).
 - ◆ **Cancel** (The Part-Time request cannot be completed until the Program Director or Dean’s Office takes action in the system).
- ▶▶ Upload appropriate documentation.

PLEASE NOTE: A syllabus must be uploaded in order to submit the request.

- ▶▶ To upload a file, click the **Browse** button. This will open a dialog box allowing a file to be uploaded. Select the appropriate file and click **Open**.



▶▶ Click **SAVE**.

If you choose to **Submit to Program Director for Approval**, the Program Director will receive an OPEN (Part-time) Exception notification

Once the Program Director has received notification to review, he/she will be required to:

- ▶▶ Scroll to find **Workflow Actions**.
- ▶▶ Choose the appropriate **Action**:
 - ◆ Decline
 - ◆ Submit to Dean's Office
 - ◆ Cancel Request
- ▶▶ Click **SAVE**.
- ▶▶ Once the Part-Time request has been submitted to the Dean's Office, you can track the status of the Part-Time exception on your **Home Page** in the **Rotation Exception box**.

PLEASE NOTE: If the request needs to be submitted to the College for approval, the Part-Time rotation exception request cannot be approved until the College approval letter is uploaded.

Once the request is approved, the following updates will be made to the Resident's profile:

- ◆ The Resident's academic record is updated to reflect the difference in FTE.
- ◆ The program ECD is updated to reflect the final PGY end date.

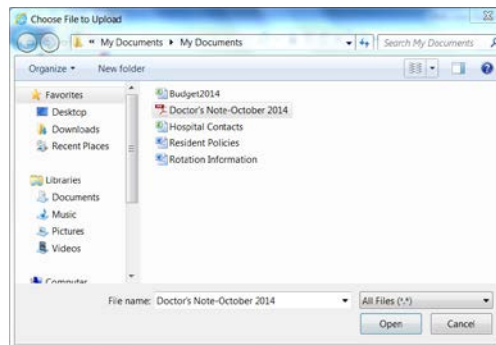
PLEASE NOTE: Please confirm that the updated academic record and program ECD are correct.

2.4 Rotation Exception: RCPSC/CFPC Assessments of Training (Credit Requests)

EXAMPLE: A credit may be requested when a Resident transfers internally to another program and would like to request credit within that program for previous training completed.

2.4.1 Requesting a New Credit

- ▶▶ Refer to the steps in [2.1](#) to start a **Credit Rotation Exception**.
- ▶▶ Choose **Credit** under Rotation Exception type.
- ▶▶ Enter a new PGY End date.
- ▶▶ A Program Director Credit Letter is a required document in order to successfully submit a Credit Rotation exception. Please upload this to the **Program Director Credit Letter** field.
- ▶▶ To upload a file, click the **Browse** button. This will open a dialog box allowing a file to be uploaded. Select the appropriate file and click **Open**.



- ▶▶ Click **SAVE**.
- ▶▶ Your request status has now changed to OPEN (Credit).
- ▶▶ Under **Workflow Actions**, you must submit to Program Director or Dean's Office for approval. You can also **CANCEL** the request if necessary.

2.4.2 Submitting a Credit Request

As **Program Administrator** you have just created your Credit rotation exception. It is in the OPEN (Credit) status and you must submit to the Dean's Office or Program Director for approval:

- ▶▶ Scroll to find Workflow Actions.
- ▶▶ Choose the appropriate **Action**:
 - ◆ **Submit to Program Director** (Your Program Director will receive a notification that they have a task in the RMS System that requires their attention.)
 - ◆ **Submit to Deans Office** (The Dean's Office will receive a notification that they have a task in the RMS System that requires their attention.)
 - ◆ **Cancel** (The Credit request cannot be completed until the Program Director or Dean's Office takes action in the system.)
- ▶▶ Click **SAVE**.

If you choose to **Submit to Program Director for Approval**, the Program Director will receive an OPEN (Credit) Exception notification.

Once the Program Director has received notification to review, he/she will be required to:

- ▶▶ Scroll to find Workflow Actions
- ▶▶ Choose the appropriate **Action**:
 - ◆ Decline
 - ◆ Submit to Dean's Office
 - ◆ Cancel Request
- ▶▶ Click **SAVE**.
- ▶▶ Once the Credit request has been submitted to the Dean's Office, you can track the status of the credit exception on your **Home Page** in the **Rotation Exception** box

PLEASE NOTE: If the request needs to be submitted to the College for approval, the credit rotation exception request cannot be approved until the College Ruling Letter is uploaded.

Once the request is approved, the following updates will be made to the Resident's profile:

- ◆ The Resident's academic record is updated to reflect the difference in FTE.
- ◆ The program ECD is updated to reflect the final PGY end date.

PLEASE NOTE: Please confirm that the updated academic record and program ECD are correct.

2.5 Rotation Exception: Waivers

PLEASE NOTE:

A waiver can only be added to a Resident's profile when the Resident is in their final year of training.

All waiver requests must comply with the RCPSC/CFPC policies on waivers of training. These policies can be found in the RCPSC document ["Policies and Procedures for Certification and Fellowship"](#) and on the CFPC Website under ["Requirements for Residency Eligibility"](#)

2.5.1 Requesting a Waiver

- ▶▶ Refer to the steps in [2.1](#) to start a **Waiver Rotation Exception**.
- ▶▶ Choose **Waiver** under Rotation Exception type.
- ▶▶ Enter a new ECD Date (*when the learner will complete their program*).
- ▶▶ Click **SAVE**.
- ▶▶ Your request status has now changed to OPEN (Waiver).
- ▶▶ Under **Workflow Actions**, you must submit to Program Director or Dean's Office for approval. You can also **CANCEL** the request if necessary.

2.5.2 Submitting a Waiver Request

As Program Administrator you have just created your Waiver rotation exception. It is in the OPEN (Waiver) status and you must submit to the Dean's Office or Program Director for approval:

- ▶▶ Scroll to find Workflow Actions.
- ▶▶ Choose the appropriate **Action**:
 - ◆ **Submit to Program Director** *(Your Program Director will receive a notification that they have a task in the RMS System that requires their attention).*
 - ◆ **Submit to Deans Office** *(The Dean's Office will receive a notification that they have a task in the RMS System that requires their attention).*
 - ◆ **Cancel** *(The Waiver request cannot be completed until the Program Director or Dean's Office takes action in the system).*
- ▶▶ Click **SAVE**.

If you choose to **Submit to Program Director for Approval**, the Program Director will receive an OPEN (Waiver) Exception notification.

Once the Program Director has received notification to review, he/she will be required to:

- ▶▶ Scroll to find **Workflow Actions**.
- ▶▶ Choose the appropriate **Actions**:
 - ◆ Submit to Dean's Office
 - ◆ Cancel Waiver Request
- ▶▶ Once the waiver request has been submitted to the Dean's Office, you can track the status of the Waiver exception on your **Home Page** in the **Rotation Exception** box.

Once the request is approved, the following updates will be made to the Resident's profile:

- ◆ The Resident's academic record is updated to reflect the difference in FTE.
- ◆ The program ECD is updated to reflect the final PGY end date.

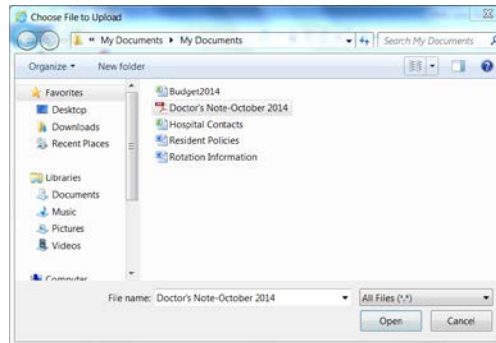
PLEASE NOTE: Please confirm that updates to academic record and ECD are correct.

2.6 Rotation Exception: Academic Record Adjustments

2.6.1 Creating & Submitting an Academic Record Adjustment

- ▶▶ Refer to the steps in [2.1](#) to start an **Academic Rotation Exception**.
- ▶▶ Choose Academic Record Adjustment under Rotation Exception type.
- ▶▶ Choose an **Adjustment Reason (Block Adjustment or Other)**.
- ▶▶ Enter a new **PGY End Date**.
- ▶▶ Enter comments in the **Comments** box and upload supporting documentation for the request. This will allow the Resident, Program Director, Dean's Office or other Program Administrators to view the reason for the Academic Record Adjustment.

- ▶▶ To upload a file, click the **Browse** button. This will open a dialog box allowing a file to be uploaded. Select the appropriate file and click **Open**.



- ▶▶ Click **SAVE**.
- ▶▶ Your request status has now changed to **Approved (Academic Record Adjustment)**.
 - ◆ The Resident's academic record is updated to reflect the difference in FTE.
 - ◆ The program ECD is updated to reflect the final PGY end date.
- ▶▶ No further action is required.

PLEASE NOTE: Please confirm that updates to academic record and ECD are correct.

2.7 Rotation Exception: Internal Transfer

DEFINITION: *Internal Transfer - A resident moving from one UBC Postgraduate training program to another.*

2.7.1 Creating a New Internal Transfer Request

- ▶▶ Refer to the steps in [2.1](#) to start an **Internal Transfer Rotation Exception**.
- ▶▶ Choose **Transfer-Internal** under Rotation Exception type.
- ▶▶ Enter an **Effective Date** (*when the resident will be transferring out of their current program*).
- ▶▶ Enter **Program Transfer information**.
- ▶▶ Click **SAVE**.
- ▶▶ The Transfer request has now been sent to the receiving Program Administrator for approval and your request status has changed to **Transfer Request Verification (receiving program)**.

The Receiving Program Administrator will have the following actions available:

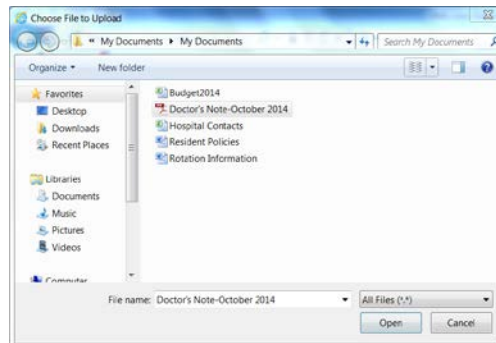
- ◆ Submit to Dean's Office for approval.
- ◆ Request for Additional Information from transfer program (*Receiving Program Administration must provide further information in the Internal Comments box*).
- ◆ Decline transfer (*receiving program*).

PLEASE NOTE: "Comments" are visible to ALL users including Residents. "Internal Comments" are only visible to Administrators.

If you choose to **Request for Additional Information from transfer program**, here are the next steps:

The Transfer Program Administrator will receive a notification and be able to view the **Internal Comments**.

- ▶▶ Open the **Exception Notification**.
- ▶▶ Upload any supporting documentation.
- ▶▶ To upload a file, click the **Browse** button. This will open a dialog box allowing a file to be uploaded. Select the appropriate file and click **Open**.



- ▶▶ Under **Workflow Action**, choose **Submit to Receiving Program Administrator**.
- ▶▶ Click **SAVE**.
- ▶▶ The Transfer request has now been sent to the Receiving Program Administrator for approval and your request status has changed to **Transfer Request Verification (Receiving Program)**

The Receiving Program Administrator will have the following actions available:

- ◆ Submit to Dean's Office approval.
- ◆ Additional Information Required (*from transfer program*).
- ◆ Decline Transfer (*receiving program*).

If you choose to submit to Dean's Office for approval, the Dean's office will receive a notification. Once the Internal Transfer request has been approved by the Dean's Office, the resident's status will be updated:

- ◆ If the Resident Release Date is in the future, the Resident's status changes to transferring.
- ◆ If the Resident Release Date is today's date or before, the Resident's status changes to transferred-out.
- ◆ The Resident's status will update to Active-new program on the day of release.

3 Remediation

DEFINITION: *Remediation - A defined period of time with training objectives and learning components structured to address areas of weakness or deficit in performance or in conduct that have been identified in the Resident's training.*

3.1 Adding in Remediation Time for a Resident

- ▶▶ This request type is still undergoing testing.
- ▶▶ Any requests for assistance should be submitted to rms.support@ubc.ca.
- ▶▶ This user guide will be updated with a process workflow once this request type has been implemented; Program Administrators will be notified.

4 Resident Annual & Promotion Review

DEFINITION:

Annual Review – A yearly review of all Residents’ academic records for accuracy (initiated by the Dean’s Office).

Promotion Review – A review elevating Residents to the next year of training (automatically created in RMS based on the Residents’ academic record). These reviews are generally created 20 days before a Resident is due for promotion.

As Program Administrator you will receive notification in RMS when your action is required.

- ◆ Annual or Promotion Review notifications will appear on your **Home Page**, under **Resident Reviews**.
- ◆ The review type will be indicated in the **Review Type** column and the status will show “Pending Review”.

4.1 Approving Annual & Promotion Reviews individually:

- ▶ Select the resident name under **Resident Reviews**.
- ▶ Verify the following academic record information is accurate:
 - ◆ Effective date of PGY level
 - ◆ Program Information
- ▶ Scroll to **Workflow Actions**.
- ▶ Choose the appropriate **Action**:
 - ◆ **Approve Promotion OR Complete Review** (Updates the Review to “Approved” status, indicating that the Promotion information is correct).
 - ◆ **Place on Hold** (Updates the Review to “On-Hold” status, indicating that further investigation is required and remains in the queue until approved or completed).
- ▶ Click **SAVE**.

PLEASE NOTE: The **DUE DATE** in the **Workflow Overview** indicates the date the Review must be completed. Placing a resident on hold past the due date will **NOT** halt the promotion process.

4.2 Approving Annual & Promotion Reviews in Bulk:

Annual & Promotion Reviews can be reviewed and approved/confirmed by using the bulk method:

- ▶ On the **Home Page**, under **My Pages**, select **BULK Approve – Resident Reviews**.
- ▶ Your **Resident Review** listings will be displayed.

- ▶ Beside each Resident review you have the following **Actions** to choose from:
 - ◆ **Approve** (Updates the Review to “Approve” status, signifying that the Promotion information is correct).
 - ◆ **Hold** (Updates the Review to “On-Hold” status, signifying that the Resident requires further investigation).
- ▶ Check the appropriate action beside each Resident. You can enter a comment beside any Resident action using the **Comment box**.

PLEASE NOTE: “Comments” are visible to ALL users including Residents. “Internal Comments” are only visible to Administrators.

- ▶ Once all reviews have been selected, click **SUBMIT PROMOTION REVIEW** at the bottom of the page.
 - ◆ If approved or completed, the review will be updated to the **Approved status** and no longer be in the Program Administrator's queue.
 - ◆ If placed on hold, it will remain in the queue until approved or completed.

Bulk Approve - Resident Reviews UBC F&M RMS v3.0.07 - Trainee/Officer Information Manager (Program Administrator)

RESIDENT REVIEW LISTING

Review Type	Resident Name	Current Program	Current PGY	Current Program RCS	New Program	New PGY	Effective Date	Exceptions	Approve	Hold	Comments
Annual	Completing Starting New Program - On Cycle, Annual Review - Test Do Not Modify	Anatomical Pathology	PGY 5	06/30/2015	Cardiac Surgery	PGY 1	06/30/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Promotion-On Cycle, Annual Review - Test Do Not Modify	Cardiac Surgery	PGY 3	06/30/2015	Cardiac Surgery	PGY 4	07/01/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Promotion-On Cycle, Annual Review - Test Do Not Modify	Internal Medicine	PGY 1	07/03/2015	Internal Medicine	PGY 2	07/04/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Super Long PGY, Annual Review - Test Do Not Modify	Internal Medicine	PGY 3	02/13/2020				Yes	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Holiday, Hal	Family Medicine	PGY 2	10/01/2015			10/01/2015	Yes	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Completing Program - Off Cycle, Annual Review - Test Do Not Modify	Family Medicine	PGY 2	07/14/2015			07/14/2015	Yes	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Completing Starting New Program - On Cycle, Annual Review - Test Do Not Modify	Family Medicine	PGY 2	07/01/2015	Family Medicine - Emergency Medicine	PGY 3	07/01/2015	Yes	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Completing Starting New Program - Training Gap, Annual Review - Test Do Not Modify	Internal Medicine	PGY 4	06/30/2015	Family Medicine	PGY 5	06/30/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Promotion-On Cycle, Promotion Review - Test Do Not Modify	Family Medicine	PGY 1	10/05/2015	Family Medicine	PGY 2	10/05/2014	Yes	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Promotion Job, Test	Cardiac Surgery	PGY 3	08/04/2015	Cardiac Surgery	PGY 4	08/05/2015	Yes	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Lee, James	Family Medicine	PGY 1	07/02/2016	Family Medicine	PGY 2	07/03/2015	Yes	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Rotation/Exception/Email Test, Robert	Adolescent Medicine	PGY 1	06/30/2016	Cardiology - Adult	PGY 1	06/30/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	On Cycle w/ Exceptions, FTE-Reporting Test Do Not Modify	Cardiac Surgery	PGY 1	09/29/2020	Cardiac Surgery	PGY 2	09/01/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Lee, James2	Family Medicine	PGY 1	09/22/2016	Family Medicine	PGY 2	09/23/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Completing Program - On Cycle, Annual Review - Test Do Not Modify	Internal Medicine	PGY 4	06/30/2015			06/30/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Promotion-On Cycle-Starting Final PGY, Annual Review - Test Do Not Modify	Family Medicine	PGY 1	09/30/2016	Family Medicine	PGY 2	10/01/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	S13, Test	Anesthesiology	PGY 4	09/24/2016	Anesthesiology	PGY 5	09/25/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Completing During Current Academic Year, Annual Review - Test Do Not Modify	Cardiac Surgery	PGY 6	10/01/2014			10/01/2014	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Promotion On Cycle-Starting Final PGY, Annual Review - Test Do Not Modify	Cardiac Surgery	PGY 5	06/30/2016	Cardiac Surgery	PGY 6	06/30/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Payroll, Payroll-Test Test	Cardiac Surgery	PGY 3	07/01/2015	Cardiac Surgery	PGY 4	06/01/2015	Yes	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Holiday, John	Internal Medicine	PGY 3	09/01/2016	Internal Medicine	PGY 4	07/01/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Payroll, John	Anesthesiology	PGY 1	09/23/2019	Anesthesiology	PGY 2	09/24/2015	Yes	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Test, Banner Update	Internal Medicine	PGY 1	06/30/2016	Internal Medicine	PGY 2	07/01/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Lee, James3	Internal Medicine	PGY 1	06/30/2016	Internal Medicine	PGY 2	07/01/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Lee, James4	Internal Medicine	PGY 1	06/30/2016	Internal Medicine	PGY 2	07/01/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Test, FTE-Report Test	Dentistry	PGY 3	06/30/2019	Dentistry	PGY 4	07/01/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	S20, Promotion Review - Test	Cardiology - Adult	PGY 2	10/10/2015	Cardiology - Adult	PGY 3	10/10/2014	Yes	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Test, FTE-Report Test	Dentistry	PGY 1	06/30/2021	Dentistry	PGY 2	07/01/2015	No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Gum, UAT	Gastroenterology - Adult	PGY 1	10/14/2015	Gastroenterology - Adult	PGY 2	10/14/2014	Yes	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	UAT, Robert	Cardiac Surgery	PGY 3	09/13/2018	Internal Medicine	PGY 1		No	<input type="checkbox"/>	<input type="checkbox"/>	
Annual	Lee, James5	Cardiac Surgery	PGY 2	10/14/2018	Cardiac Surgery	PGY 3	10/16/2014	Yes	<input type="checkbox"/>	<input type="checkbox"/>	

Submit Promotion Review 

5 Statutory Holiday Requests

Definition: Statutory (Stat) Holiday- *A ParBC-approved holiday that entitles a resident to time off.*

Stat Holiday Requests are submitted by the Resident to the Program Administrator for approval. The Program Administrator receives a notification via email when a request has been submitted. Requests can also be viewed on the **RMS Home Page**.

PLEASE NOTE: *This request is currently initiated by the Program Administrator. Residents will be able to submit their own Statutory Holiday requests using RMS effective November, 2014.*

5.1 Approving a Statutory Holiday:

5.1.1 Approving Statutory Holiday Requests Individually

- ▶ Select the Resident under the **Stat Holidays** in your **Home Page**.
- ▶ Choose the appropriate **Action**:
 - ◆ Request Additional Information *(Request will be sent back to the resident for additional information and will remain in the queue).*
 - ◆ Decline Stat Holiday *(Request will be denied and the resident will be advised via email).*
 - ◆ Approve Stat Holiday *(Request will be updated to “Approved” status and notification will be sent to the Compensation Administrator).*
- ▶ Notes can be provided in the **Comments** box.

PLEASE NOTE: *“Comments” are visible to ALL users. “Internal Comments” are only visible to Administrators.*

- ▶ Click **SAVE**.

Once stat holiday has been approved, a notification will be sent to the Compensation Administrator for processing.

5.1.2 Approving Statutory Holiday Requests in Bulk:

Statutory Holiday requests can be approved using the bulk method.


- ▶ On the Home Page, under My Pages, select **BULK Approve – Stat Holidays**.
- ▶ Your **Resident Stat Holiday** listings will be displayed.
- ▶ Beside each Stat Holiday request you have the following **Action** to choose from:
 - ◆ **Approve** *(Updates the request to **Approve** status, signifying that the Promotion information is correct).*
- ▶ Check the **Approve** box beside each Resident.

- Once all stat holidays have been selected, hit the **SUBMIT STAT HOLIDAY WORKED** button at the bottom of the page.

Bulk Management - Stat Holidays Worked UBC FoM RMS v3.0.0f - Bob_Program_Admin (Program Administrator)

STAT HOLIDAYS WORKED LISTING

<input type="checkbox"/> Approve	Current Program/Site/Stream	Resident Name	Hospital ID	Holiday Worked	Holiday Worked Date	Comments
<input type="checkbox"/>	Anesthesiology / Vancouver / CMG	Payroll, John	13434515	Labour Day	09/01/2014	Test

Submit Stat Holiday Worked 

Once approved, the stat holiday will transition to the Approved status and no longer be in the Program Administrator's queue.

PLEASE NOTE: It is NOT possible to Decline or Request Additional Information for Statutory Holiday Requests using the bulk method.

6 Search

6.1 Standard Search

- ▶ To perform a standard Resident search, click the **Search** tab at the top of the **Home Page**
- ▶ Select **Standard Search (Resident)** in the **Tracking Inbox**.
- ▶ Check the boxes next to each field to expand search criteria.

The screenshot shows the 'Standard Search (Resident)' form. It includes a navigation bar with 'HOME', 'TRACKING INBOX', 'SEARCH' (highlighted), 'REPORTING', 'ENTELLISQL', and 'ADMINISTRATION'. Below the navigation bar, there's a breadcrumb trail: 'Search > Standard Search (Resident)'. The form has a 'Search' button and a 'Reset' button. It contains several expandable sections with checkboxes: 'Resident', 'Academic Record', 'Resident Request', 'Registration', 'Audit Log', 'Contact Information', 'Emergency Contact', 'Documents', 'Programs', 'Contract', 'Post Secondary Information', and 'Assignments'. There are also search criteria fields: 'Date' (with a dropdown menu set to 'EQUAL TO' and a date input field), 'Type' (with a dropdown menu set to 'EQUAL TO' and a type input field), and 'Description / Comments' (with a dropdown menu set to 'LIKE' and a text input field). At the bottom, there are 'SEARCH OPTIONS' with checkboxes for 'Show English Query' and 'Show SQL Query', and another 'Search' and 'Reset' button.

- ▶ Click the drop-down menu within the expanded search criteria to further narrow the search.
- ▶ Once the search criteria have been selected, click the **Search** button.
- ▶ Search results will be displayed.

The screenshot shows the search results page. It includes the same navigation bar as the previous screenshot. Below the navigation bar, there's a breadcrumb trail: 'Search > Standard Search (Resident) > Results'. The page displays 'Matching Results: 2'. There are pagination controls: 'Page 1 of 1', 'Display 2 per page', and a 'Refresh' button. The results are shown in a table with the following columns: 'Resident ID', 'First Name', 'Middle Name', 'Last Name', 'Resident Type', 'Resident Status', 'Program Name', 'Program Site', 'Stream', and a detail icon. The table contains two rows of results.

Resident ID	First Name	Middle Name	Last Name	Resident Type	Resident Status	Program Name	Program Site	Stream	
2014-101024	Uni		Test	CaRMS	New	Emergency Medicine	Fraser Region	IMG	
2014-101055	John		Doe	CaRMS	New	Adolescent Medicine			

- ▶ Select the Resident by clicking on the detail icon in the last column of the search result row.

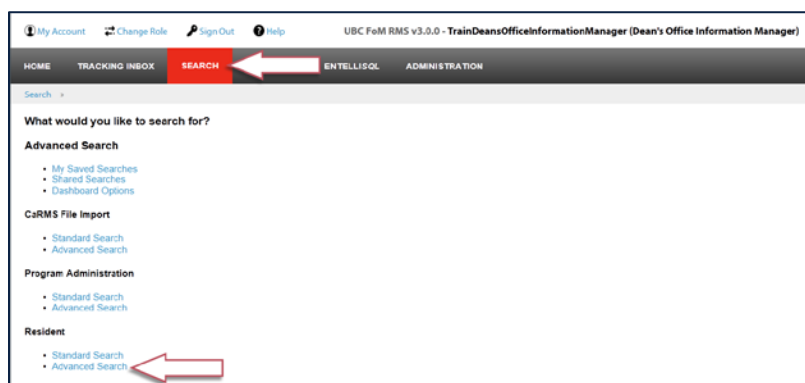
Resident ID	First Name	Middle Name	Last Name	Resident Type	Resident Status	Program Name	Program Site	Stream
2014-101024	Uni		Test	CaRMS	New	Emergency Medicine	Fraser Region	IMG
2014-101055	John		Doe	CaRMS	New	Adolescent Medicine		

- ▶▶ The **Resident Profile** page of the selection will be displayed and the search is complete:
 - ◆ To return to the results screen, click **Results** in the breadcrumb trail at the top of the page.
 - ◆ To change search criteria, click **Standard Search (Resident)** in the breadcrumb trail.
 - ◆ To start a new search, click **Reset**.

6.2 Advanced Search

The Advanced Search feature of RMS provides a robust search engine and allows the user the ability to:

- ◆ view sub-level data in the search results
 - ◆ export data to MS Excel, MS word, PDF
 - ◆ save frequently-used searches
 - ◆ create search shortcut in **Home Page**
 - ◆ share searches with other users
- ▶▶ When you navigate to the **Advanced Search** module, the **Search Criteria** screen is displayed by default.
 - ▶▶ Click on **Advanced Search** to display search options and navigations tabs.
 - ▶▶ Each tab provides instructions in order to generate various search results.



PLEASE NOTE: Samples of common searches amongst resident programs will be forthcoming...

7 RMS Support

All staff support requests related to RMS, including new accounts, technical support, and process questions, should be submitted to the Educational Administrative Systems Support Analyst at rms.support@ubc.ca.

▶▶ You can expect your request to be:

- ◆ Reviewed within one business day
- ◆ Resolved within two business days or updated with an expected completion date

PLEASE NOTE: There may be some delays during the RMS implementation phase.

▶▶ When submitting your support requests, please include the following information:

- ◆ Name
- ◆ Role (Program Administrator, Program Director, Dean's Office Administrator, Compensation Administrator, Resident)
- ◆ CWL Username
- ◆ Contact Information (email, phone number)
- ◆ Department / Program / Program Site
- ◆ Request / Issue / Question
- ◆ Screenshot or Additional Details